# AASC

AMERICAN ASSOCIATION OF SETTLEMENT CONSULTANTS

CONFERENCE

April 17-19 2023

Hilton Scottsdale Resort & Villas

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CONFERENCE

# TABLE OF CONTENT

# A FRESH TAKE ON STRUCTURED SETTLEMENTS

To us, “Safe. Secure. Settled.” isn’t just a marketing slogan; it is the foundation upon which our company is built, leading us to become the second fastest growing life insurance company in the industry.

**OUR COMPANY’S MISSION, VISION, AND VALUES ARE ALIGNED WITH THOSE OF THE AASC.**

We partner with settlement consultants to provide a better outcome to injury victims and their families. With the best customer service team in the structured settlement market, you and your team will spend more time focused on what matters most and less time waiting on answers and policies.

## INDEPENDENT LIFE IS:

### SAFE.

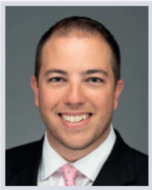
Safer through a mono-line product approach, no high interest rate liabilities to manage, and global investment leader BlackRock managing our bond portfolio

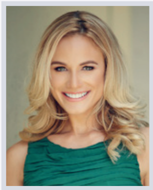
### SECURE.

More secure for plaintiffs through unique protection enhancements outlined in our Payee Protection Policy

### SETTLED.

Creating more settlements (and structures) by bridging the gap other providers are unable or unwilling to do, whether it be through realistic rated ages or the acceptance of qualified settlement funds in compliance with IRC 468B



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# American Association of Settlement Consultants 2023 Conference Schedule

**Hilton Scottsdale Resort & Villas**

**April 17-19, 2023**

## MONDAY APRIL 17

**12:00pm-5:00pm** — **Registration Desk Open**
Salon 1 Foyer

**12:00pm-4:00pm** — **Committee Meetings**
Sonora A & B

**4:00pm-5:00pm** — **Board Meeting**
Sonora A

**5:00pm-7:00pm** — **Welcome Party**
Sierra Loggia

## TUESDAY APRIL 18

**8:00am-8:30am** — **Breakfast**
Sierra Loggia

**8:30am-8:45am** — **Opening Remarks by AASC President Tory Owens**
Salon I & II
*All Educational Sessions will take place in Salon I & II*

**8:45am-9:20am** — **Using Qualified Settlement Funds (QSFs) in Collaboration with the Defense**
Our speaker will help you identify ways to reach an agreement with the defense on settlements that benefit plaintiffs. Additionally, they will use case studies to demonstrate tax-saving strategies, working with defense to overcome standard objections about structures and provide useful talking points about non-qualified structures.

Speakers:

- Randy Levine, Sage

**9:20am-9:30am** — **Committee Update**
Brian Schachter

Schedule subject to change prior to the conference.

AASC has applied for 9 CE credits in the following states: AZ, CA, CO, CT, FL, GA, IA, ID, IL, IN, LA, MA, MD, MN, MO, MT, NJ, NY, OH, ON, OR, PA, TN, TX, VA, WI, and WY.

**9:30am-10:15am**

**Leveraging Technology to Do Your Job More Effectively**

Our speakers will discuss how to use the newest industry technologies as part of your winning argument for the use of structured settlement and other complimentary products to your clients. See how you can illustrate the use of a trust with a structured settlement or retail annuity showing multiple outcomes depending on risk.

Speakers:

- James Creel, Capital First Trust
- Chris Bua, Independent Life

**10:15am-10:45am**

**Cordero and the Settlement Planning Industry**

Lujerio Cordero's lawsuit against Transamerica for failing to enforce anti-assignment provisions in his Structured Settlement Agreement and related Assignment Agreement currently is being decided by the New York State Court of Appeals. The National Structured Settlement Trade Association (NSSTA) has filed an Amicus Brief arguing that if Cordero wins, this case would impose upon annuity issuers and structured settlement obligors a heretofore unknown fiduciary duty. That fiduciary duty, according to NSSTA's brief, would unfairly increase the cost of structured settlements, require annuity issuers to pass judgment on the "best interests" of claimants seeking to transfer payment rights, and eliminate protections granted to annuity issuers and obligors under the state protection acts. Cordero argues Transamerica failed to take the most rudimentary steps required of an "interested party" in a transfer proceeding and thereby violated the contractual terms of an "anti-assignment agreement" and thereafter failed to honor an obligation of candor to the court. The issues and business practices being argued in this case are fundamental to all structured settlement transactions. Regardless of the outcome, the Cordero case represents a uniquely important educational opportunity for all structured settlement and settlement planning professionals.

Speakers:

- Patrick Hindert, Independent Life

**10:45am-11:00am**

**Break**

**11:00am-11:45am**

**Tracking Medicare's Movements**

Get up to date on the latest Medicare rules as our speakers discuss different types of Medicare plans and products and how they could benefit settlement recipients under a variety of scenarios. Additionally, learn best practices on resolving Medicare liens.

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Speakers:

- John Kane, Ametros & MSP Network
- Amanda Greenburg, Archer

**11:45am-12:15pm** **Legislative Update**

Get an update on the latest happenings in Congress, including AASC's progress on getting sexual abuse cases added to 104(a)2 as physical injuries.

Speakers:

- Jennifer Wieroniey, AASC
- Warren Payne, Mayer Brown, LLP

**12:15pm-1:30pm** **Small Group Lunch**

AASC's Partner Members will be hosting small groups of attendees for lunch on the town in Scottsdale.

**1:30pm-2:30pm** **Using Trust Companies: Case Studies**

Trusts can be an incredibly useful tool for settlement recipients, particularly as you look to preserve government benefits. Hear from our speakers about practical use cases for the various types of trusts. Real world examples will help you identify scenarios where your client could benefit from the use of a trust.

Speakers:

- Joanna Wynes, Sage
- Will Lindahl, CPT Institute
- Christi Fried, Continental Trust

**2:30-3:15pm** **IRS Regulatory Update: GLAM**

Attorney Robert Wood will discuss the implications of the IRS GLAM on attorney fee structures. Attendees can expect to get the latest updates on industry action following the IRS memo.

Speakers:

- Robert Wood, Wood LLP

**3:15pm-3:30pm** **Break**

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**3:30pm-4:00pm**

**Emotional Intelligence: Tools for Connecting with Claimants**

This session will help you understand the emotional impact injuries have on clients and how to utilize tools to connect with claimants, bring them comfort and solidify trust more easily.

Speakers:

- George Audi, Sage
- Rebecca Korn, Rise, Reign, Rule

**4:00pm-5:00pm**

**Retail Annuities vs. Structured Settlements: Differences and Use Cases for Both**

Learn about fixed-indexed annuities and why they could be an attractive option for claimants and their attorneys. This session will discuss the opportunities associated with using retail products versus structured settlement products, including examples and use cases.

Speakers:

- Steven Sandberg, Legend Financial
- Tanis Kelly, Sage

**5:00pm-5:30pm**

**Integrating Market-Based Solutions with Annuity Solutions**

Our speaker will provide a comprehensive overview for the settlement consultant on how they may combine the best features of the structured settlement annuity with a variety of market-based solutions to provide realistic strategies to deal with the impact of future inflation on the overall settlement plan. Additionally, our speaker will highlight market-based strategies that have been successfully utilized on large tax-free along with taxable cases to minimize tax loss. Plus, several examples of how non-qual wrongful imprisonment, construction defect, and disputed life insurance have been successfully settled with market-based products.

Speaker:

- John McCulloch, Arcadia Settlements Group

**5:30pm-7:00pm**

**AASCPAC Reception**

**8:00pm-11:00pm**

**President's Party**

Culinary Dropout
7135 E Camelback Rd

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## WEDNESDAY APRIL 19

**8:30am-9:00am** — **Breakfast**

**9:00am-9:15am** — **Opening Remarks with President-elect Joanna Wynes**
Salon I & II
*All Educational Sessions will take place in Salon I & II*

**9:15am-9:45am** — **Market Update**
How will the Fed's continued rate hikes affect the industry and the economy at large? Will annuity rates continue to rise? Get the latest updates on the financial markets and forecasts for the remainder of the year.

Speaker:
- Stephen Judeau, Bank of America

**9:45am-10:30am** — **Settlement Planning in Worker's Comp Cases: Medical and Indemnity Considerations**
Learn the ins and outs of worker's comp cases. Our speakers will identify the best way for you to maximize benefits for your clients and make the most of their settlements.

Speakers:
- Johnny Meyers, Ametros
- Jeffrey Klugerman, Ringler

**10:30am-10:45am** — **Break**

**10:45am-11:15am** — **Avoiding Malpractice Risk at Settlement for Plaintiff Lawyers**
Settlement consultants maximize value for litigants and counsel. They can also reduce malpractice risk. Plaintiff lawyers are often surprised to learn how broad their client responsibilities are at settlement. Especially when they learn after becoming a defendant. With informed consent, plaintiff lawyers can narrow their scope of representation and avoid malpractice exposure. We'll discuss what settlement consultants should know so they can protect the lawyers they work with.

Speakers:
- Jeremy Babener, Structured Consulting

**11:45am-12:30pm** — **Insights from the IRS**
Internal Revenue Service (IRS) stakeholder liaison will provide attendees with the latest IRS insights. Time will be reserved for Q&A at the end.

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**Speakers:**

- Lisa Novak, Internal Revenue Service (IRS)

**12:30pm-12:35pm** **Closing Remarks**
AASC President Tory Owens

## GEORGE AUDI

George Audi has been serving clients since 1996. Married to his wife Denise for more than 25 years, George has two children, Gabriella and Dylan, and two golden doodles. He is keenly aware of the importance of family.

Throughout his years of experience, George has assisted hundreds of families, from a $17,000 minor's auto injury case to a $25,000,000 wrongful death malpractice case, and everything in between. All cases, regardless of the settlement amount, require the attention of a caring, skilled, and qualified financial professional. In George's words, "I believe my most significant quality is that I truly care about people. When I'm in front of a client, I try to put myself in their shoes and get a better understanding of their overall situation—not just financially, but emotionally as well. When clients know that you really care about them and their situation, it creates a level of trust and makes it abundantly easier to plan and work together to accomplish their objectives."

George has been a valuable resource to hundreds of personal injury law firms. They rely on him to attend mediations, conduct multiple meetings with clients, prepare tailored financial plans, and foster those relationships long after the settlement has been reached. George is proud to be an inaugural Gold Business Partner of the Pennsylvania Association for Justice, Philadelphia Trial Lawyers Association, as well as The Northeastern PA Trial Lawyers Association.

In his personal life, George is an avid baseball and golf fan, evidenced in the monthly TV show he hosts, Golf Talk. With his infectious personality and abundance of energy, his passion for his family, his work, and his hobbies are evident in all he does.

## JEREMY BABENER

Jeremy Babener is a nationally recognized tax attorney who focuses his practice on lawsuit awards, settlements, and complex structures. He serves as Special Tax Counsel at law firm Lane Powell and chairs the Legal Committee of the Society of Settlement Planners. He is the founder of Structured Consulting, which offers business advice to a wide range of companies, including those serving plaintiffs, general investors, and retail customers.

Jeremy previously served full-time in Lane Powell's Tax Group and later as vice-president to firm client Multistream Capital, a financial company selling customized income stream investments. He previously served as a fellow in the U.S. Treasury Department's Office of Tax Policy, focusing on partnership tax issues including non-compensatory partnership options and debt-equity exchanges.

He received LL.M., Taxation, and J.D. from New York University School of Law. He received his B.A. in Political Science with high honors from Haverford College in 2007.

## CHRISTOPHER BUA

Chris Bua has spent over a decade in structured settlements on both the planning and provider sides of the industry. He oversees Independent Life's sales and marketing functions and is responsible for building relationships with settlement professionals across the nation. Chris is a board member of The Society of Settlement Planners and creator of the hit podcast, "Settlement Nation".

Prior to joining Independent Life, Chris held a variety of sales and operational roles at Delta Settlements, most recently as its Director of New Business.
Chris earned a Juris Doctorate from Florida Coastal School of Law and a Bachelor of Business Administration from the University of Florida. In his spare time, Chris enjoys playing golf, listening to country music, and spending time with his daughter.

## JAMES CREEL

James Creel joined Capital First in 2012 and has 30 years of experience in the financial services industry including banks, investments, insurance, and trusts. He has assisted personal injury victims establish financial plans since 1989 and has helped over 1,000 personal injury victims establish plans to protect and secure their financial future. James is a Chartered Special Needs Consultant.

As a Trust Consultant for Capital First, James works closely with settlement planners and trust attorneys to establish trust solutions to protect clients from wasteful dissipation of settlement funds and provide income, security, liquidity, and growth over the clients' lifetime. He frequently attends mediations and court proceedings.

James currently lives in the Charlotte, NC area with his wife and 4 children. He enjoys fly-fishing, hiking, and volunteering as a Middle School Baseball coach for his children's school.

## CHRISTI FRIED

Christi Fried is the president and owner of Continental Trust Services, LLC. She utilizes her entrepreneurial leadership experience to coordinate and service the often fragmented legal and medical needs of settlement participants. She leverages her strategic relationships with lawyers in over 34 states and 4 countries to facilitate the development of individual trusts for families involved in personal injury claims. After settlement, she combines innovative servicing solutions, outstanding customer service and competitive pricing to bring exceptional value to the experience of the beneficiary.

## PATRICK HINDERT

Patrick Hindert has been a leader in the structured settlement industry for over 40 years. At Independent Life, Patrick is responsible for New Business Development, including new products, new clients and new markets.

Before joining Independent Life, Patrick served as President of a national structured settlement intermediary that he owned and managed for 22 years. Prior to entering the structured settlement industry, Patrick taught French, coached varsity tennis and practiced transactional law.

Patrick co-authors a legal treatise utilized by NSSTA and the Society of Settlement Planners (SSP) in their certification programs. He also authors Independent Life's blog "The Chronicle," is a frequent speaker at national structured settlement conferences, including serving as the keynote at the first national structured settlement conference in Australia. Patrick has also served as President and Director of the NSSTA and as Executive Director of the SSP. Patrick provided expert testimony to the United States House Ways and Means Committee prior to enactment of the Periodic Payment Settlement Act of 1982.

Patrick earned a Juris Doctor from the University of Michigan Law School and a Bachelor of Arts cum laude majoring in History from Harvard University, where he was a staff writer for the Harvard Crimson, and is an NSSTA-CSSC. Patrick and his wife share an active life with their children and grandchildren as well as their three dogs, three cats and two rabbits.

**JOHN KANE**

John is the Vice President of Strategy at Ametros. With over 30 years of experience in a variety of workers' compensation and liability claims positions, he leads the strategic direction for Ametros' workers' compensation and liability programs, including the implementation of professional administration. His extensive background in Medicare Secondary Payer (MSP) compliance makes him an expert in leading the adoption of high performing programs that protect both clients and the injured individual with professional administration.

Prior to Ametros, John had a successful career with Liberty Mutual Insurance company, working in various positions including Regional Claims Manager for Integrated Disability Management, Loss Portfolio Risk Manager, and AVP & Director of Medicare Compliance Program.

John is both a leader and educator in the workers' compensation industry. He has a Business Management degree and hold san Associate in Claims (AIC), Medicare Set-Aside Consultant Certified (MSCC) designation, and Certified MSP Professional (CMSP).He is also a leader with The Medicare Secondary Payer Network (MSPN)and an active member of the Medicare Advocacy Recovery Coalition (MARC), instructing the Certified Medicare Set Aside program.

**TANIS KELLY**

Tanis Kelly is a settlement consultant who partners with leading law firms to develop customized settlement solutions for injured claimants.

As a former litigation attorney, Tanis knows what drives a successful settlement resolution. Her thorough knowledge of government benefits, structured settlements, and trusts, along with her access to top industry experts in lien resolution, Medicare Set-Asides, and mass tort administration create a well-rounded and efficient method for resolving claims. Tanis has the unique ability to help attorneys and claimants navigate the court system to ensure compromise petitions are approved expeditiously.

A frequent speaker for multiple trial lawyer associations, Tanis has published articles in Plaintiff Magazine and The Trial Lawyer. Her steadfast work contributed to Sage being named the Best Structured Settlement Broker in California by The Recorder (2018, 2019).

Tanis holds a B.A. from The University of Colorado Boulder and a J.D. from U.C. Hastings College of the Law, where she graduated cum laude. She proudly supports San Francisco Trial Lawyers Association, Alameda Contra Costa Trial Lawyers Association, Western Trial Lawyers, and Consumer Attorneys of California, among other consumer advocacy and trial attorney organizations.

Tanis lives in San Francisco with her husband and their three young children. Outside of work, she plays hide and seek, reads (primarily Dr. Seuss) and changes far too many diapers. She also enjoys cheering on the Warriors, hitting the mountains to ski, and playing golf and tennis.

**JEFFREY KLUGERMAN**

Jeffrey B. Klugerman is an experienced financial professional at Ringler Associates. He specializes in structured settlements and settlement planning with over 20 years of experience. He has served as a consultant to many attorneys, claims professionals and their clients about settlement planning issues. Jeff specializes in Medical Malpractice, Product Liability, Mass Torts, Catastrophic Personal Injury, Sexual Harassment/Molestation, and Attorney Fee Periodic Payments.

**RANDY LEVINE**

Randy Levine is a settlement consultant and founding partner with ESS Settlement Services, an affiliate of Sage Settlement Consulting. He was a former trial attorney with Schachter & Levine, LLP, where he gained extensive experience that informs his settlement planning work with personal injury and medical malpractice clients. Prior to co-founding Schachter & Levine, Randy was a senior litigator at a medical malpractice defense firm. Having worked for both plaintiffs and the defense, he brings a unique perspective to comprehensive settlement planning.

Randy graduated from Brooklyn Law School in 1994 with his Juris Doctorate. In 1993, he proudly won the Nassau Academy of Law's Moot Court Competition, as well as a Certificate of Distinguished Merit.
Randy has been published by and has lectured with both the Practicing Law Institute and the New York State Academy of Trial Lawyers. He is a former member of the New York State Trial Lawyers Association, and a former Board Director of the New York State Academy of Trial Lawyers. In partnership with Sage Settlement Consulting, ESS Settlement Services is a Skyline Business Partner of the New York State Trial Lawyers Association.

**WILL LINDAHL**

Will Lindahl, MBA, CLPF, is the National Executive Director of the CPT Institute. He has spent the last twenty+ years working at CPT Institute providing education and training to the legal community. He provides no-cost consultations to the legal and judicial community. He helps counsel to identify barriers to a settlement and how to distribute settlement funds without endangering government benefit eligibility for the injured and/or their dependents.
His competencies include, Fiduciary Analysis, Spend-downs, Agency notifications, SSA POMS, DHCS Rules, Medicaid & SSI Rules, Housing, EBT & SNAP, Catastrophic injury life planning.

**jOHNNY MEYER**

Johnny Meyer is responsible for cultivating and maintaining relationships among business partners. He is focused on developing strategies and business plans with partners and executing against metrics and milestones to drive growth and revenue.
Johnny brings over a decade of experience working in business development, marketing, and customer service, and obtained his B.A in Sports Management, with a minor in Business Management from Salem State University.
He currently resides just outside of Boston, with his girlfriend and puppy. He's passionate about volunteering with the Make-A-Wish Foundation & animal shelters, traveling, cooking, and sports- especially Boston sports.



## JOHN MCCULLOCH

John McCulloch is a Vice President of IFS and a Vice Chairman of Arcadia Settlements Group. Arcadia is a national structured settlement consulting firm dealing in torts, Workers' Compensation, employment, and other types of settlements, with over $1 billion in structured settlement transactions annually. John's primary expertise is taxation of damages, and he recently obtained a favorable ruling from the IRS on using structured settlements to resolve taxable employment claims. Prior to joining Arcadia and IFS in 2006, John was the Senior Vice President of Structured Settlements for Allstate Assignment Company, a subsidiary of Allstate Life Insurance Company. John joined Allstate as a Senior Manager of Product Development in June of 2000. His product development efforts include the creation of the Structured Sale, reinsurance products, special purpose assignment companies, and numerous specialized marketing initiatives. In March of 2002, John was promoted to Director of Market Development, where he oversaw the sales and development activities of the Payout Annuity area and assumed leadership of the Structured Settlement department overall in January of 2004. From there he led the Structured Settlement area to its three best sales year in Allstate's 23 years in the Structured Settlement industry, with annuity sales exceeding $700 million in 2005. Prior to joining Allstate, John was the Regional Vice President of Structured Settlements for Aegon/Transamerica. Before joining Aegon, John served as a Sales Manager for Safeco Life's Structured Settlement area and held the role of Claims Supervisor and Structured Settlement Coordinator at Safeco Property &Casualty.

John spent eight years in the U.S. Army, serving in the Field Artillery, Cavalry, and Infantry. He holds an MBA from the University of Phoenix, a JD from Kaplan University, and a BA in Business from St. Martin's College. In addition, he has completed graduate studies in Electronic Commerce at the University of San Diego and holds the following professional designations: CSSC, FLMI, WCLS, AIAA, ACS, and CMSS™, as well as an accounting certification from the Department of Defense. His formal insurance training includes casualty, property, fidelity and Workers' Compensation claims, as well as Life and Health underwriting.

## REBECCA KORN

Rebecca Korn is an esteemed financial advisor coach, entrepreneur, and the visionary founder of Rise Reign Rule. With a deep-rooted passion for igniting potential, Rebecca leads a cutting-edge consulting group that is renowned for its personalized coaching and guidance, propelling individuals and businesses to achieve unprecedented levels of success. The firm places emphasis on a holistic approach to achieving results, with a focus on black-box thinking, adaptability, analytical skills, communication skills, strategy and personal mastery. She has received numerous accolades for her work in the financial industry and has successfully run a team with millions under management, for which she has received national recognition for her results and strategy. Her expertise has captured the attention of industry leaders, to include MarketWatch, InsuranceNewsNet, entrepreneur.com as well as big box firms.

## WARREN PAYNE

Warren S. Payne is a senior advisor in Mayer Brown's Washington DC office and a member of the Tax, Public Policy, Regulatory & Political Law and International Trade practices. He joined Mayer Brown from the US House of Representatives Committee on Ways and Means, where he held a number of staff leadership roles from 2007 to 2015, including serving as policy director.

As the Committee's policy director Warren was responsible for developing policy in all areas within the Committee's jurisdiction. Major legislation that Warren worked to enact into law includes the Tax Increase Prevention Act, the ABLE Act, the Middle Class Tax Relief and Job Creation Act, two highway and infrastructure funding bills in 2012 and 2014, and free trade agreements with Colombia, Peru, Panama and South Korea. In addition, Warren was responsible for the development and introduction of the first detailed legislation since 1986 to comprehensively reform the US Tax Code with the introduction of the Tax Reform Act of 2014. Other major pieces of legislation developed by the Committee during Warren's tenure as policy director include the Bipartisan Congressional Trade Priorities Act of 2014 and the SGR Repeal and Provider Payment Modernization Act.

Warren served as a senior staffer to both the National Commission on Fiscal Responsibility and the Joint Select Committee on Deficit Reduction. In his role as Policy Director, Warren was responsible for working with Subcommittee Staff Directors to develop and implement the Committee's priorities and coordinated those efforts with House of Representative Leadership-serving as a key liaison with the Administration, the Senate as well as House Leadership. Originally, Warren served as one of the Committee's primary economists focused on trade policy, where he crafted the economic analysis behind the recent trade agreements with Colombia, Panama, Peru and South Korea.

Before joining the Ways and Means Committee, Warren served as an economic advisor and international trade analyst at the US International Trade Commission. He also consulted on international trade and tax issues at Economic Consulting Services.



**JENNIFER WIERONIEY**

As AASC's Executive Director, Jennifer Wieroniey serves as the Chief Executive Officer of the AASC and the AASC Political Action Committee (PAC). A resident of Washington, D.C., Jennifer is a veteran association executive, previously she served as Executive Director of the American Trucking Associations' National Accounting and Finance Council. Jennifer also has experience working on Capitol Hill and has successfully advocated before the Internal Revenue Service, the U. S. Small Business Administration, and Congress. A former tax attorney, she has an expertise in federal tax regulations and finance.

Jennifer earned her law degree from Drexel University's Thomas Kline School of Law in Philadelphia. Additionally, she holds an M.A. in Public Policy from Johns Hopkins University and a B.S. in Economics and Political Science from Towson University. She has been admitted to the bar in Maryland, the District of Columbia, and the U.S. Tax Court. She holds an active membership with the D.C. Bar Association.

Jennifer lives in Washington, D.C. with her husband, two young children, and two dogs. She is an avid runner, having completed nine marathons. Before kids changed everything, Jennifer enjoyed traveling the world and has visited six of the seven continents. Additionally, she serves on the Board of Directors for the Palisades Community Association, where she frequently volunteers her time.

**ROBERT WOOD**

Robert Wood is often listed among the top ten tax lawyers in America. He handles a broad range of tax planning and tax controversies. He also serves as an expert witness on tax matters in civil cases, class actions, disputes over independent contractor or employee classification, etc. A widely published author known for explaining and demystifying complex tax concepts, Mr. Wood is best known for his expertise advising plaintiffs, defendants, lawyers, and settlement funds on settlements and judgments. He authored the leading book on this topic, Taxation of Damage Awards & Settlement Payments (5th Ed 2021), as well as the Bloomberg Tax Management Portfolio Tax Aspects of Settlements and Judgments (522).

The author of numerous other tax books and hundreds of articles, he is listed among the elite tax lawyers in the United States by many best lawyers periodicals. Mr. Wood writes regular columns in Tax Notes, Forbes, and other publications, and comments on tax matters in the media.

**STEVE SANDBERG**

Steve has been in the financial services industry for 25 years, and is insurance and securities licensed with series 7, 24, 63 and 65 designations. He has worked in various roles including Director of Annuities, Senior Managing Director, Senior Vice President and President for Professional Planners Marketing Group, Allianz, and his own firm, Paloma Financial Services. Steve has been part of both independent, and insurance-company-owned national insurance and financial services marketing and brokerage firms. In 2018, he merged his own firm, Paloma Financial Services, with Legend, in an exciting opportunity to build a new company with his long time colleagues Jon Bussert and Mark Dombroski.

At Legend, Steve specializes in annuities and securities and acts as a consultant to advisors, helping them expand their practice by designing the best solutions to meet each of their clients' specific needs and objectives, without a bias to a specific product. He acts as the co-fiduciary to the advisor and provides them with a very high level of personalized, concierge service, calling his advisors at least once a week and updating them on industry news and company updates that are relevant to their practice and their clients. His goal is to help Legend grow to be the best and most respected FMO in the country for independent insurance agents, registered representatives and investment advisory representatives. Legend's success is based on it's "Best Interest Model", "Co-Fiduciary" philosophy, and "Open Architecture Platform" which allows it to put advisor and client interests first.

Steve is the Ritual Committee Chairman for the Chabad of Palm Beach Gardens. He lives in Palm Beach Gardens, Florida with his wife, Michelle. They have 2 daughters, 4 grandchildren and a golden retriever named Emmy.

**Joanna Wynes**

Joanna Wynes is a Settlement Consultant with Sage Settlement Consulting. Over the past several years in the settlement planning industry, Joanna has worked on many single-event and mass tort cases. She has worked closely with individuals and families dealing with motor vehicle accidents, medical malpractice, wrongful birth, wrongful death, product liability, dog bite, and workers' compensation settlements. Top attorneys rely on Joanna to provide mediation support, help claimants understand their options and prepare customized settlement plans.

A Baltimore native, Joanna graduated magna cum laude from the University of Baltimore School of Law, where she was in the top two percent of her class. Following graduation, Joanna worked at several prominent Philadelphia law firms, representing clients involved in medical malpractice, defective product, and motor vehicle accident torts. She achieved seven- and eight-figure settlements and verdicts on behalf of her clients.

After returning to Baltimore, Joanna transitioned to the settlement industry as a Medicare Set-Aside consultant. She learned the nuances of the Medicare Secondary Payer Act and gained a deeper understanding of the financial implications faced by injured individuals with ongoing medical needs.
Through her professional career and the experience of growing up with a disabled parent, Joanna deeply understands and empathizes with the emotional, medical, and financial needs of injured individuals and their families. She knows that settlement funds need to last as long as possible. Without appropriate guidance, individuals risk losing government benefit eligibility, being taken advantage of financially, and spending the settlement funds too quickly. Joanna's compassionate yet pragmatic approach to settlement planning helps claimants maximize their settlements and create long-lasting financial security.

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MEDICARE SET-ASIDES

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ARCHER IS PROUD TO SUPPORT THE AMERICAN ASSOCIATION OF SETTLEMENT CONSULTANTS.

## EXPERTISE, SERVICE, AND INNOVATION

With industry-founding leadership and hundreds of highly-trained professionals on staff, ARCHER has the dedicated resources to meet objectives. We set clear expectations at the onset of every project via a scope of project services, timeline, and detailed cost projections. With streamlined processes, proprietary technology, and detailed oversight, law firms can expect timely project completion and high-quality results. ARCHER leads the industry in providing best-in-class services that reduce time and expenses while maximizing output.

ASSURA TRUST

## Comprehensive Settlement Solutions that Improve Lives

We're a different kind of trust organization, exclusively serving the needs of parties settling claims. Assura Trust offers a uniquely qualified team of trust and settlement experts who work with professional settlement consultants to build comprehensive solutions.

### Growth Structured Settlement (GSS)

**The Growth Structured Settlement offered by Assura Trust is a structured settlement product that was designed in partnership with Vanguard, specifically to meet the needs of injured claimants and their families.** GSS works hand in hand with settlement annuities to deliver long-term growth for injured people. It provides tax-fee periodic payments by utilizing a broadly diversified all-index fund strategy by Vanguard. GSS includes features that provide an optimum blend of risk and return potential making it an attractive settlement tool to be used cooperatively by both consultants representing the plaintiff as well as the defense. Please consider GSS for your next settlement opportunity.



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